



Version 1.0.36a

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Version 1.0.36a - Released June 6, 2024

Known issues fixed, improvements and new features added as follows:

 **Note:** Some of these changes were implemented as **Hot Fixes** during the development cycle. They were fixed on separate dates, but weren't published about until the official release. Our development team is constantly releasing new changes to better serve great customers like you!

 Due to certain updates you may need to perform a hard refresh on certain pages like the Item Detail page. Check out these instructions on performing a hard refresh: [How to Perform a Hard Refresh and Clear Cache](#)

#	Changes	Revision
1	ADDED	Stripe Payment Gateway Returns: We've rebuilt our Stripe payment gateway from the ground up to accommodate changes in the Stripe API, ensuring a smoother and more reliable payment experience.
2	ADDED	Added new Role permissions for Email Templates, Form Templates, and Label Templates. We ask that you please review your Roles with this new update.
3	ADDED	Added the Promise Date field to the Docs table for use in Reports. Example: Inventory Valuation Report by Bin as of the Promise Date
4	ADDED	New Preference: Show form templates in letter size (8.5x11) Preferences > General > Advanced Forces a default page size for Form Templates when they are converted to PDF
5	ADDED	New Preference: When cloning an Assembly, also clone all its Revisions Preferences > Production > Advanced Cloning an Assembly Item will retain all of its BOM Revisions
6	ADDED	New Preference: When creating a Sub of Customer copy the Addresses and Contacts Preferences > Sales > Advanced

7	ADDED	New Preference for Kit Exports: When exporting sales order or quote with kits, use the kit items instead of the selections Preferences > Sales > Advanced
8	ADDED	New Preference: Include unapproved purchase orders in an item's summary. Preferences > Purchasing With this preference selected, the Items on Order Tab and Item Summary will include Items on a Purchase Order that is in Processing status. If it is unchecked then it will only include Items on a Purchase Order that has been moved to the Approved status.
9	ADDED	New Preference for Returns: When creating the return, use the customer's ship to address instead of the return location. Preferences > Shipping
10	ADDED	When you add the Shipping Instructions column to the Sales Order List, each Sales Order with instructions will be highlighted. Added as a way to signal important instructions on the list view.
11	ADDED	The Purchase Order Line Item endpoint has been added to our REST API
12	ADDED	You can now add the Note column to the Inventory List and the Inventory Status by Location List. It displays whatever you put in the Item Note field
13	ADDED	Added the ability to Import Related Items for upsell / replacements etc.
14	ADDED	Added the Related Items table to Item Reports
15	ADDED	Added a new API method called CreateShipDocFrom SO, this mimics the same action when you press the Ship Doc button on a Sales Order
1	IMPROVED	New and Improved Configurable Bill of Materials (Config BOM) experience. We have revamped and made it easier than ever to set them up.
2	IMPROVED	Better Loading for Payments: The loading time for the Payment Edits screen and Create New Payments screen should be significantly faster because we have added paging. You can make multiple selections on multiple pages and all of them will remain selected.
3	IMPROVED	The Price Level drop-down on a Sales Order will no longer show Inactive Price Levels
4	IMPROVED	Expanded Language Support: We've added translations for all new labels in Spanish and French
5	IMPROVED	Improved the behavior when clicking to download an attachment to prevent an accidental double-click
6	IMPROVED	Vendor Part No. is now available to add to Transfer Form Templates
7	IMPROVED	The Item Alias tab is now available for Leads, so now you can set those up before they've become a Customer

8	IMPROVED	Made it possible to use Custom Fields as additional filters in the Fulfillment Batch
1	FIXED	Fixed an issue where cloned Sales Orders and Purchase Orders did not calculate Tax because the line items bugged out
2	FIXED	Fixed an issue that caused Non-US Purchase and Sales Tax Codes to be overwritten when QuickBooks Online syncs
3	FIXED	Inventory Items can no longer be entered with a negative Price
4	FIXED	Fixed an issue where the Quantity of a Linked Work Order in the Dependency tab was not matching the true Quantity on the Work Order itself.
5	FIXED	Fixed an issue where Customer Returns were not possible when the Ship Doc contained a Non-Inventory or Service Item
6	FIXED	Fixed an issue where the Prevent Sync button was not operating correctly for Repair Orders
7	FIXED	Fixed the Receiver Line Import so that it maps the linked Purchase Order number to each line
8	FIXED	Fixed an issue where the Report Scheduler will send even when a Report Schedule is set to Inactive
9	FIXED	Fixed an issue where users who could only View Receivers could not Create Vendor Returns
10	FIXED	Fixed an issue where Lot/Serial Numbers with 0 Quantity couldn't be utilized in a Repair Order
11	FIXED	Fixed an issue with Customers doubling up in Xero by syncing Customer Account Numbers
12	FIXED	Fixed an issue where Rentals were not appearing under Lot/Serial Number Transactions
13	FIXED	Fixed an issue where Alerts weren't triggering properly when they were set for changing a Purchase Orders' status to Closed
14	FIXED	Fixed an issue where sales rounding was not occurring when clicking the Margin %
15	FIXED	Fixed an issue where a Payment could become over applied from a Sales Order to a Ship Doc when the Sales Order had open quantities and a Discount applied
16	FIXED	Fixed an issue with Last Purchase Cost and Last Purchase Date - they weren't updating when a Receiver Line Item has been deleted, so they would appear incorrect on Reports
17	FIXED	Fixed an issue with the Auto Package feature not sequencing properly

18	FIXED	Fixed issue where creating an Event with the same Start and End time would put a 2 hour block on the calendar, you can no longer create one with the same time in both fields
19	FIXED	Fixed an issue that could occur when creating and deleting a Pro Forma Invoice where the open quantities would not reset
20	FIXED	Fixed an issue that could happen intermittently where the wrong Doc No would be included in Alerts or when doing Batch Sending
21	FIXED	Fixed an issue where the Invoice No wasn't populating when doing a POST for a Receiver via the API
22	FIXED	Fixed an issue where the Modified Date on a Sales Order wasn't being updated when a Payment was made
23	FIXED	Fixed an issue which stopped the Frequently Run Reports from updating properly
24	FIXED	Fixed an issue where the Contact on a Sales Order wasn't changes to the Customer occurred after the transaction was created. Fixed for Quotes, Sales Orders, and Purchase Orders with Vendor changes.
25	FIXED	Fixed an issue where removing delete commands from the accounting sync queue would cause them to come back infinitely
26	FIXED	Fixed an issue where changing the a column to Grouping or from Grouping to Data on a Ledger style report would cause errors
27	FIXED	Fixed an issue with Calculated Custom Fields on Work Order Steps where the calculation was not being performed